

Overview

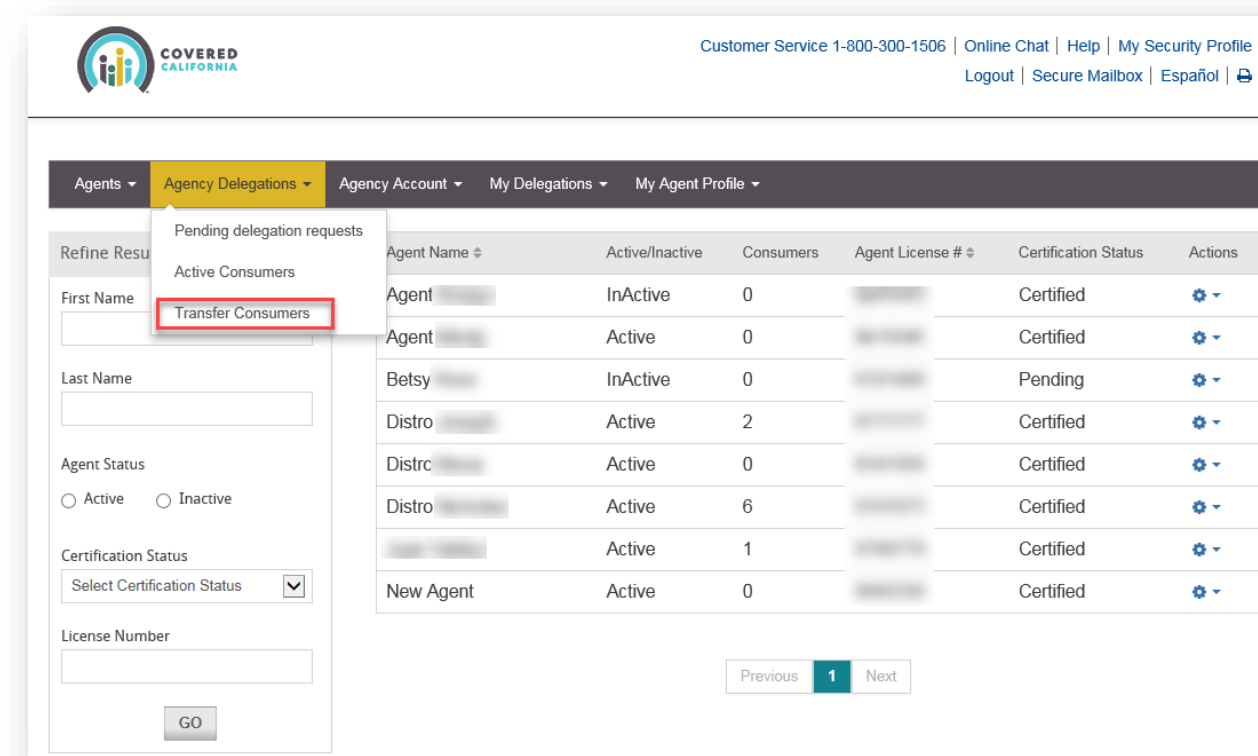
Agency Managers have the ability to transfer consumer delegations between Agents within the Agency without assistance from Covered California. This functionality includes [transferring consumers one by one](#), as well as transferring the [entire Book of Business between Agents within the same Agency](#).

Please Note: To transfer consumers or an entire Book of Businesses to an Agent outside of the Agency, please contact Agent Contracts at agentcontracts@covered.ca.gov for assistance.

Transferring a Single Consumer

Agency Managers have the ability to transfer a single consumer or multiple consumers or the entire Book of Business to an Agent within the Agency.

From the Agency Delegations drop-down menu, select the “Transfer Consumers” link to navigate to the **Active Consumers** page.



The screenshot shows the Covered California Agency Managers interface. At the top, there is a navigation bar with the Covered California logo and links for Customer Service (1-800-300-1506), Online Chat, Help, My Security Profile, Logout, Secure Mailbox, and Español. Below the navigation bar is a dark grey menu bar with several dropdown options: Agents, Agency Delegations (highlighted), Agency Account, My Delegations, and My Agent Profile. A dropdown menu is open under 'Agency Delegations', showing options: Pending delegation requests, Active Consumers, and Transfer Consumers (highlighted with a red box). To the left of the main table is a 'Refine Results' sidebar with search filters for First Name, Last Name, Agent Status (Active/Inactive), Certification Status (Select Certification Status), and License Number, along with a 'GO' button. The main area displays a table of agents with columns: Agent Name, Active/Inactive, Consumers, Agent License #, Certification Status, and Actions. The table lists several agents, including 'Agent', 'Betsy', 'Distro', and 'New Agent'. At the bottom of the table is a pagination bar with 'Previous', '1' (selected), and 'Next' buttons.


Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Agent	InActive	0		Certified	⚙️
Agent	Active	0		Certified	⚙️
Betsy	InActive	0		Pending	⚙️
Distro	Active	2		Certified	⚙️
Distr	Active	0		Certified	⚙️
Distro	Active	6		Certified	⚙️
	Active	1		Certified	⚙️
New Agent	Active	0		Certified	⚙️



Transferring Consumers Within an Agency Job Aid


Agency Managers

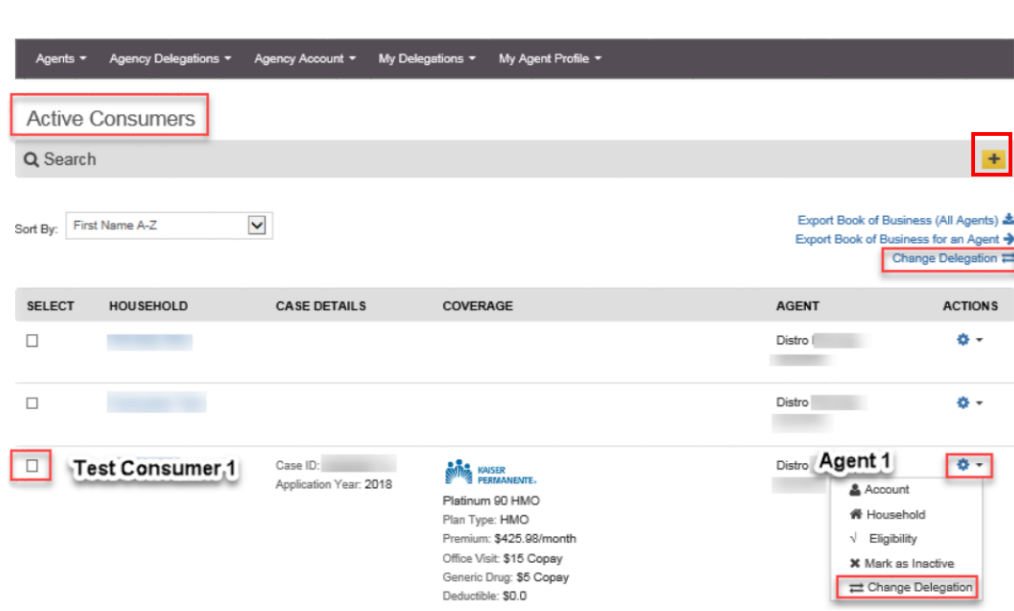
The **Active Consumers** page will display the complete list of consumers delegated to Agents within the Agency.

A search for a specific consumer can be done by selecting the  and entering the consumer's full first and/or last name, or other identifiable information.

The Agency Manager can select one, or multiple consumers listed to transfer to a specific Agent by placing a check mark in the box in the "Select" column.


Next, there are two options to transfer delegations:

- The **Change Delegation** beneath the Search section of the page or,
- In the Actions column next to the consumer you wish to transfer by selecting the  and clicking the "Change Delegation" link.










Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

Active Consumers

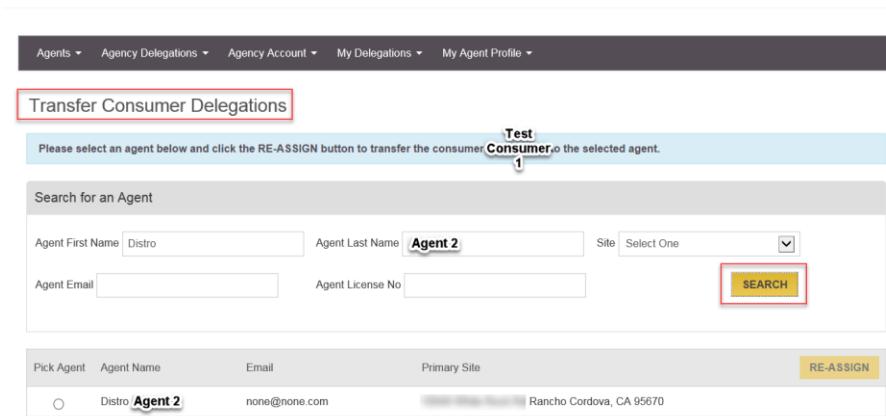
Q Search 

Sort By: First Name A-Z ▾

Export Book of Business (All Agents) 
Export Book of Business for an Agent 
Change Delegation 

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>				Distro	
<input type="checkbox"/>				Distro	
<input type="checkbox"/>	Test Consumer 1	Case ID: Application Year: 2018	 Platinum 90 HMO Plan Type: HMO Premium: \$425.98/month Office Visit: \$15 Copay Generic Drug: \$5 Copay Deductible: \$0.0	Distro Agent 1	 Account Household Eligibility Mark as Inactive Change Delegation

The Agency Manager is then navigated to the **Transfer Consumer Delegations** page where they will search for the Agent to transfer the consumer delegation.



Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

Transfer Consumer Delegations

Please select an agent below and click the RE-ASSIGN button to transfer the consumer **Test Consumer 1** to the selected agent.

Search for an Agent

Agent First Name Distro Agent Last Name **Agent 2** Site Select One ▾

Agent Email Agent License No **SEARCH**

Pick Agent	Agent Name	Email	Primary Site
<input type="radio"/>	Distro Agent 2	none@none.com	Rancho Cordova, CA 95670

RE-ASSIGN



Transferring Consumers Within an Agency Job Aid Agency Managers

After locating the Agent desired, select the radio button next to their name. Select “Re-assign” to transfer the Consumer from one agent to another.

Pick Agent	Agent Name	Email	Primary Site	RE-ASSIGN
<input checked="" type="radio"/>	Distro Agent 2	none@none.com	Rancho Cordova, CA 95670	


The Agency Manager will then get a confirmation pop up that the delegation has been transferred and re-assigned from one agent to the other.




This can be confirmed by looking at the **Active Consumer** page and noting the new Agent delegated to the consumer.

Transfer an Entire Book of Business between Agents within the Agency

Agency Managers can also transfer an entire Book of Business from one agent to another agent within the Agency. From the Agency Portal dashboard, locate the Agent with a Book of Business that needs to be transferred.



Customer Service 1-800-300-1506 | [Online Chat](#) | [Help](#) | [My Security Profile](#) | [Logout](#) | [Secure Mailbox](#) | [Español](#) | 

Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

Refine Results By [Reset All](#)

First Name

Last Name

Agent Status
☐ Active ☐ Inactive

Certification Status
Select Certification Status ▾

License Number

GO


Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Agent	InActive	0		Certified	
Agent	Active	0		Certified	
	InActive	0		Pending	
Distro Agent 1	Active	3		Certified	
Distro Agent 3	Active	0		Certified	
Distro Agent 2	Active	5		Certified	
	Active	1		Certified	
	Active	0		Certified	

Previous 1 Next

Edit

Transfer Consumer Delegations



In the **Actions** column, select the  and click “Transfer Consumer Delegation” link and you will be navigated to the **Transfer Consumer Delegations** page.

Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

Transfer Consumer Delegations

Please select an agent below and click the RE-ASSIGN button to transfer all consumers for agent Distro Agent 1 to the selected agent.

Search for an Agent

Agent First Name: Distro Agent Last Name: Agent 2 Site: Select One

Agent Email: Agent License No:

SEARCH

Pick Agent	Agent Name	Email	Primary Site	RE-ASSIGN
<input type="radio"/>	Distro Agent 2	DistroAgent2@none.com	Sacramento, CA 95815	RE-ASSIGN

Search for the Agent you are transferring the Book of Business to by entering:

- Agent First Name
- Agent Last Name
- Site
- Email Address
- License Number

The results of the search will display Agents within the Agency matching the search criteria entered.

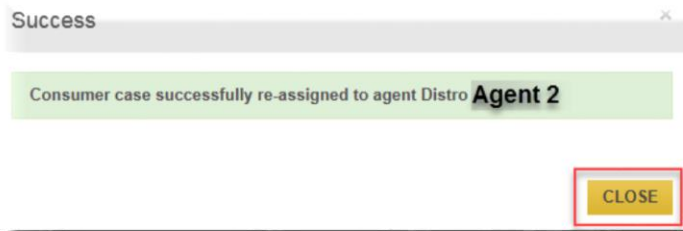
Pick Agent	Agent Name	Email	Primary Site	RE-ASSIGN
<input checked="" type="radio"/>	Distro Agent 2	DistroAgent2@none.com	Sacramento, CA 95815	RE-ASSIGN

Select the radio button next to the Agent that is accepting the Book of Business transfer and click the “Re-Assign” button to transfer all consumers delegated to one agent, to another agent.



Transferring Consumers Within an Agency Job Aid

Agency Managers



The Agency Manager will then get a confirmation pop up that the delegations has been transferred and re-assigned from one agent to the other.

This can be confirmed by looking at the **Active Consumer** page and noting the new Agent delegated to the consumer.

Customer Service 1-800-300-1506 | Online Chat | Help | My Security Profile | Logout | Secure Mailbox | Español

Agents | Agency Delegations | Agency Account | My Delegations | My Agent Profile

Refine Results By [Reset All](#)

First Name

Last Name

Agent Status
☐ Active ☐ Inactive

Certification Status
Select Certification Status ☒

License Number

GO

Agent Name s	Active/Inactive	Consumers	Agent License # s	Certification Status	Actions
Agent [redacted]	InActive	0	[redacted]	Certified	+
Agent [redacted]	Active	0	[redacted]	Certified	+
[redacted]	InActive	0	[redacted]	Pending	+
Distro Agent 1	Active	0	[redacted]	Certified	+
Distro Agent 3	Active	0	[redacted]	Certified	+
Distro Agent 2	Active	8	[redacted]	Certified	+
[redacted]	Active	1	[redacted]	Certified	+
[redacted]	Active	0	[redacted]	Certified	+

Previous 1 Next